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Wealthtech Weekly

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Reporter

The social media landscape is evolving rapidly. Older players are losing relevance, while upstarts are looking to take advantage of the gap.

Personally, I've moved away from X (formerly Twitter) and toward other platforms like LinkedIn and Bluesky. (Financial Planning just opened accounts on Bluesky and Threads.)

I recently spoke with advisors about how they're adjusting to these changes as they pursue business growth. Where are you posting on social media these days?

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

From LinkedIn to Reddit, the social media strategies that work for advisors

LinkedIn still rules for professionals, and newer platforms like Bluesky are on the rise. But is social media even worth the effort for advisors these days?

- **The best- and worst-performing energy ETFs of the decade**
  Energy investments can be volatile individually, but in many cases the aggregate can be a solid investment.
- **Trash or treasure? Dumped index stocks could be investing opportunity**

Index deletions lag the market by more than half in the year leading up to their removal from an index, but they historically outperform the market for at least five years after the breakup.

- **Morningstar looks at rate cuts, private markets, AI in 2025**
  All these topics and more were the subject of the recent webinar, "Morningstar's 2025 Outlook: Investment Strategies for the Year Ahead."
- **Models slowly but surely gaining ground with advisors, Cerulli says**
  A rapidly growing number currently use models suggested by a broker-dealer, TAMP, asset manager or third-party strategist provider without modification.

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